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## 上海电影产业发展报告 (2019)

突显优势，全面提升上海电影产业品牌影响

主编 / 荣跃明

执行主编 / 刘春

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## 摘要

2018年是中国电影产业在新时代电影产业大发展的背景下,充满机遇与挑战的一年;也是上海电影产业突显优势、全面提升上海电影产业品牌影响的一年。这一年电影艺术领域呈现出鲜明的现实主义回归,以往IP电影改编趋于沉寂,《我不是药神》《暴裂无声》《无名之辈》等一批国产电影佳作获得口碑与票房的全面丰收。电影产业保持高速发展之余,由于国家相关政策调整等原因,电影产业改革进入深水区,面临着新的变局。面对新形势新任务,本报告结合年度中国电影产业热点、年度电影、上海电影产业的新发展等,围绕“突显优势,全面提升上海电影产业品牌影响”,策划、组稿了《上海电影产业发展报告(2019)》。全书由总报告和四个内容版块组成。

“总报告”以“上海电影产业资源转换与前景”这一研究方向为主题。改革开放四十周年以来,中国电影经过一系列的体制改革、机制创新与市场探索,取得了长足的进展和辉煌的成绩。纵观当代中国电影发展史,上海电影不仅留下了许多经典作品,推出了不少产业人才,其自身发展也具有深刻的产业启示。中国电影的强国之路,离不开上海电影的长足发展。总报告就此邀请相关领域专家,聚焦上海电影产业发展的历史、现状与前景。梳理回顾上海电影的历史文化资源,聚焦产业转化的驱动研究,并在市场发展、产业布局与资源整合等层面,分析回应不断涌现且具有挑战的产业现象和热点,助力实现上海电影的品牌提升与中国电影“走出去”。

产业热点版块,主要在改革开放四十年的历史背景下,讨论在这一波澜壮阔的历史进程中,中国电影版图疆界与未来发展格局的变化调整。经过改革

开放 40 年的风云变幻,随着综合国力的稳步增长,以电影为代表的我国文化产业必须要找到和我国与日俱增的政治、经济影响力相适应的自身特色和定位。无论对于中国电影而言,还是对于整体性的我国文化产业,我们将必须面对一个长周期、全方位的、历史性的文化挑战。针对这一问题,有的专家从资源优化配置、后发优势理论、产业链角度讨论改革开放以来中国电影制片公司发展的经验与启示。有的专家聚焦具体问题,从版权、税收、影游产业互动融合等维度展开分析。

年度电影版块,专家在中国电影改革开放四十年的历程下梳理本年度的电影理论批评,指出这一年度理论批评既注重总结发展经验,又不回避矛盾和问题,从宏观和微观的交叉、理论和实践的结合、当下与未来的衔接上,对国际国内电影的动态走向进行及时跟踪,予以深入探析,努力为中国电影在新时代的发展问诊切脉,发挥了理论批评特有的反馈作用,体现了理论批评应有的立场品格。在理论批评之外,本版块对于本年度电影投融资类型、风险与市场、现实主义动画与犯罪电影类型展开研究。

聚焦上海版块,对于 2018 年度上海电影制片与创作展开分析;讨论媒介实践、创意聚集与上海电影产业的能级提升;聚焦于新形势下上海影视产业园区的国际化、平台化发展策略;研究近年来上海都市空间的影像表达产业策略中的未来感与地方性。这一版块还从开展多样公益活动、推动市民文化的建设的角度,邀请上海电影评论学会相关领导予以访谈。

多方视野版块,分析近年来中国电影海外传播这一热门产业话题。并以印度与港台地区的电影产业生态观察与研究为参照,在多方视野中把握电影产业发展。

全报告结合学界、业界研究力量,梳理和研究 2018 年度中国电影产业和上海电影产业的最新动态和突出现象,把握产业发展的重点问题,分析产业发展的新趋势,为产业发展提供决策参考和智力支持。



# Abstract

Under the background of film industry development, Chinese film industry faced a lot of opportunities and challenges in 2018. It is also a year in which Shanghai film industry has comprehensively highlighted its advantages and enhanced the influence of Shanghai film brand. This year, IP film adaptations tend to be silent and realistic art films have shown a clear return. A number of excellent domestic film, such as *Dying to Survive*, *Wrath Of Silence*, *A Cool Fish*, have gained good reputation and high box office. Due to the adjustment of relevant national policies, Chinese film industry has maintained rapid development while the industry reform has entered a much profound stage and is facing a changing situation. Facing the new situation and new tasks, “Annual Report of Shanghai Film Industry Development (2019)” focuses on the subject of “emphasizing the advantages and comprehensively enhancing the influence of the brand of Shanghai film”, includes topics as annual Chinese film industry hotspots, films of the year, the new development of the Shanghai film industry, etc. This report consists of a general report and four content sections.

The “General Report” is themed as “Conversion and Prospects of Shanghai Film Industry Resource”. During the 40 years of reform and opening-up, Chinese film has made great progress and brilliant achievements through a series of institutional reforms, mechanism innovations and market explorations. Throughout the history of contemporary Chinese film development, Shanghai film produced many classic works and cultivated many industrial talents. Its development also has profound industrial enlightenment. There is an important relationship between the

development of Chinese film and the rapid development of Shanghai film. The General Report focuses on the history, current situation and prospects of Shanghai film industry. Through reviewing the historical and cultural resources of Shanghai film, and analyzing the emerging industrial phenomena and hotspots in the aspects of market development, industrial distribution and resource integration, this report attempts to help with the promotion of Shanghai film brand and the exportation of Chinese movies.

The section of industry hotspots mainly discusses the changes of the boundaries of Chinese film and its future development pattern in the historical background of reform and opening up. With the steady growth of comprehensive national strength, Chinese cultural industry represented by film industry need to find its own characteristics and position that are compatible with this country's growing political and economic influence. Chinese film and Chinese cultural industry will have to face a long-term, all-around, and historical cultural challenge. In response to this situation, some experts probe into the experience and enlightenment of the development of Chinese film production, from the perspective of optimizing the distribution of resources, theory of advantage of backwardness and integration of industrial chain. Some experts focus on concrete issues, such as the dimensions of copyright, taxation, and integration of film and video industry.

In the section of “films of the year,” some experts analyzed film theory and criticism of this year, they pointed out that theoretical criticism of this year does not only focus on summing up the experiences through the development, but also pay attention to the contradictions and problems. They tracked the dynamic trend of international and domestic films in a timely manner, from macro and micro intersections, combing theory and practice, connecting the present and the future, striving to inscribe the development of Chinese film in the new era. It gives full play to the feedback function of theoretical criticism and embodies the character of theoretical criticism. In addition, this section discusses film investment and

financing, risk and market, realistic animation and crime film.

The section of “focus on Shanghai” analyzes the production and creation of 2018 Shanghai film; discuss media practice, creative convergence and improvement of industrial level of Shanghai film industry; focus on the internationalization and platform development strategy of Shanghai Film and television industrial park under the new situation; study the futuristic and local features of the strategy of image expression of Shanghai urban space in recent years. This section also interviewed relevant leaders of the Shanghai Film Comment Society from the perspective of carrying out various public benefit activities and promoting the construction of citizen culture.

The “Multiple Views” section analyzes the hot industry topic of Chinese film overseas communication in recent years. This section also takes the film industry in India, Hong Kong and Taiwan as references, in order to probe into the development of the film industry from a multi-view perspective.

This report tries to sort out and study the latest trend and outstanding phenomena of Chinese film industry and Shanghai film industry in 2018, to grasp the key issues of industrial development, to analyze the new trends of industrial development, so as to providedecision reference and intellectual support for industrial development.



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